



## Basic Tasks and Responsibilities Union List Libraries

This is not comprehensive, please refer to the Policies and Procedures section on the website for more information. This is intended as a quick guide.

### **Communications and Meetings:**

1. Union List members are encouraged to have all staff subscribe to the Union List mailing list to receive updates from PrairieCat. Subscribe here: <https://support.prairiecat.info/mailling-lists>
2. Union List members should make every effort to participate in the semi-annual User Group meetings to receive more in-depth updates about PrairieCat issues. Meetings listed here: <https://support.prairiecat.info/events>

### **Logins:**

1. L2 Login  
L2 is a statewide Illinois Library Directory and Learning Calendar. Any staff member of a library can create their own L2 account. Create an account here: <https://librarylearning.org/user/register>

When an account is created by a staff member there are different actions that will need to be taken:

- Creating the Account, including password.
- Create an affiliation with a location. (Your library)
- Verify the Account within 24 hours via welcome email.

Access L2 instructions and help here: <https://librarylearning.org/help>

**Library staff will use their L2 credentials to log in to the PrairieCat support site to access member only resources and training documentation.**

2. Sierra Login  
Submit a help desk ticket with login questions.
  - a. Shared circulation login for your library
  - b. Named tech login: Only for staff that add new items to the PrairieCat database and are item entry certified.

## **PrairieCat Support Site:**

Visit the PrairieCat support site to access important member information including: Member Directory, PrairieCat Email Account, PrairieCat Help Desk, News and Announcements, and Training Resources. <https://support.prairiecat.info/>

## **Help Desk Requests:**

1. Union List libraries are asked to use the PrairieCat Help Desk for routine issues or requests for setting changes. Submit a help desk ticket using your library email address. Help desk information: <https://helpdesk.prairiecat.info/>

## **Circulation:**

### **1. Borrowing Materials from other PrairieCat libraries:**

- a. Place "hold copy returned soonest" holds for your patrons via Sierra or via Vega Discover on your ILL patron record. Be sure to place "hold selected volume" holds for any multi-volume records.
- b. Check-in the item to fill the hold when you receive the material via delivery.
- c. Check the item out to your ILL patron record. It should check out for 28 days.
- d. Your patron has six days to pick up the item before it must be checked in to either return to the owning library or go on to fill another hold.
- e. Check-in the item when it is returned from the patron, and follow the instructions in Sierra to route the material to the correct destination.

### **2. Lending Materials to other libraries via the Paging List:**

- a. Process the Paging List from your library's PrairieCat email account at least once a day that your library is open, to fill holds from other PrairieCat libraries.
- b. In Sierra, check the item in and fill the hold if available. If the hold is for an ILL Barcode or SHARE library, you also need to check the item out to that library (indicated in the patron name for the hold). If the hold request is for a
  - i. Person, fellow UL library, or a specialty account; proceed with trapping the hold; label the resource for delivery; put into your RAILS delivery container
  - ii. An ILL Barcode Library – the text *ILL BARCODELIBRARY* will be part of the NAME; write down the barcode of the library; proceed with trapping the hold; Check the item out to ILL Barcode Library; label the resource for delivery; put into your RAILS delivery container

- c. If an item on your paging list is not available (checked out), you should check it out to your Checked Out patron. An easy way to search this patron in Sierra is to search by Unique ID. The Unique ID is "CHKOUTXXXX" where XXXX is your RAILS delivery code, so for example "CHKOUTALLG." On the 16th of the second month following when the item was checked out to your Checked Out patron, PrairieCat staff will cause the item to be checked in and made "Available" again.
- d. If an item on your paging list is missing, you should change the item status to "Missing." Then, when the item is found, check it back in to change the status back to "Available."
- e. Please do not just "skip" a hold request that is on your Paging List as this delays when the requesting patron will receive the item.

### 3. Managing holds:

- a. Use the "Clear Expired Holds and Holdshelf" function in Sierra regularly (suggestion is weekly). Use the "Clear" button and follow the instructions to route materials as directed. This is the only way to clear holds that have expired because the expiration date in the hold has been reached.
- b. Use the "View Outstanding Holds" report regularly (suggestion is weekly) to manage holds that you've placed for your patron that have not been filled. In some cases, the paging process may have been stalled and you may need to delete your hold and re-add it to re-start the paging process.

### 4. Overdue notices:

- a. In Sierra, overdue notices are generated from the item's owning library, so in order for patrons of other libraries to be informed about overdues, all libraries need to be involved in managing overdue notices.
- b. 1<sup>st</sup> overdue notice (generated at 10 days overdue): the majority of first overdue notices for fully participating library patrons are sent via email or phone. But, if the patron has requested print notices, they will be sent to your library via email. After checking your shelf, you should mail the notice to the patron.
- c. Subsequent overdue notices and bills: these notices are all print and are generated sequentially as the item becomes more and more overdue. They will be sent to your library via email. You should check your shelf and send the notices on to the patron if the item is still not returned. It is prudent to check the cost in the item record while you are processing these overdues, as this is the cost that the patron will be charged if they pay their home library, which the home library will then send to you.

## Reports, Statistics, and Emails:

### Emails

Which are important and which can I skip? If an email has your agencies 2-letter code in the Subject line – that **is** an important one for your library. Even if your agencies code is not listed, the message could still apply to you – especially when the message applies to ALL members (e.g. Items improperly coded for Discard).

### Reports

#### 1. Paging List – Daily

Members are to process your Paging list for hold requests, at least once a day, every day that your library is open, Monday to Friday.

#### 2. Overdues – Daily

Members are to daily process overdue notices from your PrairieCat ILL email account - print and distribute them to end users as appropriate

#### 3. Problem Holds for SHARE/ILL Barcode libraries – Weekly

Certain non-PrairieCat libraries can place holds in PrairieCat via the public catalog. When a PC library traps a hold for one of these out-of-PrairieCat libraries, procedure is for the hold trapping *library* is to check the item out to the requesting library. When this step is not completed, the Intransit item will show up on this report. The library that trapped the hold (the sending library) **MUST** check out the item they put Intransit to the requesting library.

#### 4. Dash New Report – Weekly

Members are to check this weekly report if they have items on the list. If you need to locally process the items (remove them from a 'new book' shelf, remove stickers, etc.) process accordingly.

NOTE: Members MUST check in all items on the list that are available to check for holds to be filled ("new" converted items will not appear on Paging lists).

#### 5. Long Intransit Report – Monthly

Check this list every time it comes out. Review for items coming TO & going FROM your agency. Search your shelves for your listed items. If found on the shelf, check them in in Sierra. Items "to" you will be cleared and will go to being Available. Items "from" you you'll be prompted where to route the item to. Label the resource for delivery to the destination library and put into your RAILS delivery container. Items left unresolved on this report eventually will be automatically removed from the database.

## **6. Items Improperly Marked for Discard – Monthly**

If you are coding an item for removal from the database – BOTH the Status and the Item Code 2 fields must be “set” to the proper codes. If you only code your items with a Status of Withdrawn or only code your items with an ICode 2 of Discard – those items will show up on this report. You need to update the ‘other’ field with the proper code in order for your item to be removed from the system, or the item will just continue to show on this report, month after month, after month, after month...

## **7. Old Missing Items Report – Monthly**

Items that have a Status of “Missing” for 180 days, a listing is distributed to the membership. Seek/find the item. If found, check the item in to update the Status. If, after 270 days, the item is not found / resolved, the item will be automatically updated to Discard / Withdrawn and be removed from the database the following month.

## **Inventory**

Inventory is as easy as requesting a listing of items for a specific area (e.g. work by call number prefixes, all your 100’s, 200’s, FIC, biographies). Compare the entries on the list to what you own. Items you no longer own – code those for Discard/Withdrawn. That will eliminate you from receiving Paging requests for titles you no longer own.

## **Statistics**

Visit the PrairieCat Support Site and select the Monthly/Annual Statistics from the homepage to view the regular statistics and access the reports that PrairieCat provides for members. Log in with your L2 credentials.

## **Cataloging:**

### **1. Adding New Additions to your Collection:**

- a. Union List libraries are expected to add all of their regularly circulating materials to Sierra for resource sharing. If you also wish to add non-circulating materials (e.g., reference materials) to Sierra, be sure to use a non-holdable, non-circulating item type so that you will not get hold requests on those materials. If you are having any issues with which items are requested on your paging list, please submit a Help Desk so that PrairieCat staff can check that loan rules are set up correctly for your library.
- b. It is very important that all PrairieCat libraries link their multi-volume records to the correct volume when you are adding items in Sierra. If you are not sure how to do this correctly, please contact the PrairieCat Help Desk for assistance.

- c. Union List libraries are welcome to use the “new” item types to block holds on your materials from other libraries’ patrons for 15 weeks. If you are newly going to begin to use “new” item types, please submit a Help Desk request so that PrairieCat staff can ensure that loan rules are set up correctly for your library. If you use the “new” item types, you will need to process the weekly reports that are distributed with items that are moved from “new” to regular item types after 15 weeks. Anything that is available for holds should be checked in to fill the next available hold.
- d. If you add a new title to your collection and do not find the record in PrairieCat, you can submit an OCM list with the OCLC Accession# from WorldShare (OCLC), and PrairieCat staff will download the record to PrairieCat for you. You will then need to attach your item to that bibliographic record.
- e. Union List libraries are entitled to free original cataloging each fiscal year if you have new material for which you cannot find a matching bibliographic record in OCLC. You will need to send the item physically to your cataloger for them to add an original (new) record to OCLC and download it to PrairieCat. You will then need to attach your item to PrairieCat. Contact the PrairieCat help desk for more information.

## 2. **Item Entry Certification:**

- a. The PrairieCat policy is that any staff member that ADDS items to the PrairieCat database must be Item Entry Certified. This policy is to ensure that staff who add items to the database are fully trained, to ensure the accuracy of the PrairieCat database. The following process will allow library staff to prepare for item entry duties at their library and complete item entry certification.
  - i. Complete series of courses in Talent LMS. Library staff will be given access to the Sierra test server using the training login to practice and to complete assignments.
  - ii. After successfully completing the prerequisites and courses 1-6 of the Sierra Cataloging: Item Entry series staff will receive their temporary **named tech login**.
  - iii. Complete final Talent LMS course, Sierra Cataloging: Item Entry – Practicum. Staff will submit work done in the production server with the temporary named tech login. PrairieCat staff will review and provide feedback as needed.
    - 1. Assignment Set 1: During the initial 3-month review period, submit 5 item records completed in Sierra.
    - 2. Assignment Set 2: After 3-month review period, submit another 5 item records completed in Sierra.

- iv. After successfully completing Sierra Cataloging: Item Entry – Practicum, library staff will receive their item entry certificate, and their named tech login will be made permanent
  - b. For additional practice and training with PrairieCat staff, Item Entry Workshops are available on-demand. Submit an on-demand training request: <https://support.prairiecat.info/forms/request-demand-training>
  - c. Visit the PrairieCat support site for more information on this training and how to access TalentLMS: <https://support.prairiecat.info/overview>
- a. Item Entry Certification stays with the individual, so if they move to a different PrairieCat library, they are still certified.